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Chief Financial Officer with strong experience managing Finance, Accounting, Legal, Human Resources, and IT in private companies. Demonstrable ability to lead organizations through growth opportunities and challenging economic climates. Focus on key metrics which drive revenue growth, effective cash management, and profitability. Effective team player who works across the organization to ensure completion of corporate objectives.

Key Areas of Expertise

- Financial Planning & Analysis
- Business Strategy
- Software, Hardware, Services, & Internet
- Revenue Models & Recognition
- Systems & Controls
- Equity & Debt Financing
- Board of Directors Communications
- Acquisition & Banker Due Diligence
- Mergers & Acquisitions
- Contract Review & Negotiations
- Staffing & Compensation

Professional Experience

*WALL SOFTWARE INC., San Francisco, CA
2004 - 2010*

CFO, Sr. Vice President, Finance & Operations
Wall Software, a private corporation, was the leader in the transaction data management market. Developed and led finance, accounting, legal, human resources, and IT. Scaled the company: revenue run rate from \$18M to \$90M; employee base from 70 to 250; new direct sales force; diversified product offerings; international expansion; and 24/7 support. Financed largely by cash flow from operations.

Transformed the business from 90% concentration in one product and one channel to a new direct sales force covering multiple vertical markets with a full suite of solutions.

Improved profitability by increasing gross margins from 57% to 85%, and focusing on efficient operations and infrastructure to support growth.

Effectively managed capital resources. Closed Series C financing of \$10M. Supplemented equity with \$20M bank line based on recurring revenues.

Significantly improved board of director visibility into the operations via improved analysis and presentations.

Lead efforts to prepare operations for public company readiness: implemented SAP, Equity Edge; partnered with sales to improve sales pipeline visibility; improved controls; ensured strong compliance with revenue recognition requirements via training and contract negotiation processes.

Managed due diligence efforts during acquisition and played a key role in negotiations, leading to a successful close of the transaction.

BROOKDEEP INC., San Pedro, CA 2003 - 2004

Vice President, Financial Planning & Analysis

Brookdeep is a publisher of educational online and CD-ROM products which expanded through acquisitions, significantly: Edmark in 2000; and The Learning Company and Broderbund in 2001. In 2002, the company went private in an LBO. Joined company in 2003 to focus on financial integration and standardization of plans and metrics. Team contributor in major restructuring of debt facility.

- Developed annual operating plan; foundation for refinancing efforts.
- Key team member involved in banker due diligence process for re-financing of company debt.
- Designed and led roll-out key performance indicators to support restructured organization.
- Developed and implemented fully-allocated P&Ls for accounts and products.
- Re-engineered company-wide forecasts, planning and Operational Reviews.
- Managed analysis required for three year audit of all acquisition entities;
- key deliverable for refinancing.

CLEAN ENERGY, San Francisco, CA 2002 - 2004

Board Member, Acting COO

CE was an early stage company developing solutions for the use of hydrogen as energy. The Company designed an end-to-end solution, involving hydrides, fuel containers and activation appliances, as well as the software infrastructure to support efficient distribution.

- Developed executive summary and investor materials.
- Closed angel funding of \$100K.
- Completed working prototype demo unit for storage and release of hydrogen.
- Secured government grant of \$1M for expanded R&D efforts.

INDAVUS INC., Santa Cruz, CA 2000 - 2002

CFO

Indavus was an early stage company developing biometric based authentication for the payments processing market funded via Offroad Capital. Company completed successful market trials with major fast food and supermarket operators. (Company was acquired by Solidus Networks in 2002.)

- Led financing and due diligence efforts for Series B financing, resulting in offer for majority ownership by major financial institution.
 - Developed business model focused on transaction based, recurring revenue used for internal planning and financing efforts.
 - Completed company's first audit since inception in 1995.
 - Created detailed customer ROI model to support Business Development.
 - Designed and implemented board presentations and briefings.
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KOLIBRI INC., Emeryville, CA 1999 - 2000

CFO

Alibris provides hard to find books to business partners and consumers. Led financing and restructuring through a challenging shift in the economy.

- Raised \$36M in private equity financing and \$1M equipment lease line.
- Led banker due diligence efforts and internal preparation for IPO, including initial draft of an S-1.
- Restructured company in response to changing economic environment.
- Developed restructured plan to achieve profitability with no further financings.
- Led effort which improved gross margins by 100%.
- Designed improved analytics and format for management and board reports.
- Completed three year audit and tax returns, including restatements for acquisitions..
- Integrated three acquisitions, including a major competitor, Bibliocity.

TABLEWARE INC., Mountainview, CA 1998 - 1999

CFO

TableWare was an early leader in the internet conferencing services.
(Company was acquired by Microsoft in 2003.)

- Raised Series C financing of \$19M and bank lines of \$2M.
- Developed business model for company's shift towards term licensing.
- Revised revenue recognition policy to respond to new revenue model.
- Designed board presentations and Key Performance Indicatory dashboard.
- Developed processes and reporting for royalty and licensing arrangements.
- Worked closely with Marketing and Sales on pricing and discount policies.
- Designed new compensation plans for sales force.
- Negotiated sublease for facilities, benefits, and corporate insurance coverage.

SILICON TECH, INC., Campbell, CA 1995 – 1998
ORACLE CORPORATION, Redwood City, CA 1992 - 1995
ABC FINANCIAL SYSTEMS, INC., Berkeley, CA 1989 – 1992
ATLANTIC BELL DIRECTORY, San Francisco, CA 1988 - 1989
CHIPLAND CORPORATION, Oakland, CA 1983 - 1988

EDUCATION

(worked at full and part-time jobs to finance 100% of education)

- Columbia University, New York, MBA
- University of California at Berkeley, BA

OTHER:

- Board Advisor, Jumpfire Inc., Mountain View, CA 2002 - 2004
 - Commissioner, Santa Rosa Library Advisory Board 2000 - 2005
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